

Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

Date/Time Stamp: 17 MAY 23 PM 2:24

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): American Telemedicine Association

Travel date(s): April 22, 2017 - April 25, 2017

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$291.96	\$463.98	\$275.00	\$500 - registration fee
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): see attached

5/22/17
(Date)

Mary Margaret Johnson
(Printed name of traveler)

Mary Margaret Johnson
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

May 22, 2017
(Date)

[Signature]
(Signature of Supervising Senator/Officer)

Memorandum

To: Senate Ethics Committee

From: Mary Margaret Johnson

CC: Senator Roger Wicker

Date: May 23, 2017

Re: Travel for the American Telemedicine Association 2017 Convention

While attending the American Telemedicine Association Convention on April 23, 2017, to April 25, 2017, I was able to attend several educational sessions regarding the barriers for the use of telehealth in our nation's healthcare system, the growth of telehealth, and new advances being made in telehealth. In these sessions, speakers from various academic research institutions spoke about reimbursement for telehealth by private insurance and state or federal coverage. In a session entitled "Emerging Research and Policy Agenda for Telemedicine", the panelists discussed potential definitions of telehealth and the pros and cons of the various proposed definitions.

The Congressional staff attending the conference spoke at a Federal Policy Luncheon. At the luncheon, I spoke about Senator Wicker's work on the CONNECT for Health Act and the importance of connectivity for the health-care system and telehealth.

On the second day of the conference, representatives from the University of Mississippi Medical Center pointed to successful results of their remote patient monitoring systems for people living with diabetes in the Mississippi Delta. The final day of the conference included educational sessions that discussed increasing access to pediatric care with telehealth and the increased use wearables and mobile applications in telehealth.

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EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Mary Margaret Johnson

Employing Office/Committee: Senator Roger F. Wicker

Private Sponsor(s) (list all): American Telemedicine Association

Travel date(s): Sunday, April 23, 2017 to Tuesday, April 25, 2017

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Orlando, FL

Explain how this trip is specifically connected to the traveler's official or representational duties:

As the Chairman of the Commerce Subcommittee on Communication, Technology, Innovation, and the Internet, Senator Wicker is interested in the emerging technologies that will help lower cost and increase access to healthcare. As a legislative correspondent assisting with health-care and technology policy, this conference will give me an opportunity to meet with health-care professionals and learn about how they use telemedicine and the emerging technologies. I will be able to discuss with ATA participants Senator Wicker and Senator Schatz's CONNECT for Health Act and later brief the Senator on how the new telemedicine services can lower health-care costs for the federal government.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

3-20-17
(Date)

Mary Margaret Johnson
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Roger F. Wicker hereby authorize Mary Margaret Johnson
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

3-21-17
(Date)

Roger F. Wicker
(Signature of Supervising Senator/Officer)



American Telemedicine Association
1100 Connecticut Ave. NW, Suite 540, Washington, DC 20036-4146
Phone: 202.223.3333 Fax: 202.223.2787 www.americantelemed.org

March 8, 2017

Ms. Mary Margaret Johnson
Office of Sen. Wicker
SD-555 Dirksen Senate Office Building
Washington, D.C. 20510

Dear Ms. Johnson:

We invite you to attend the ATA Annual Conference and Trade Show in Orlando, FL from April 23-25. The ATA Conference is the world's largest and most comprehensive meeting focused on telemedicine, digital, connected and mobile health.

During the visit, you will have the opportunity to tour our exhibit hall featuring over 300 healthcare technology products, and hear about 100 peer-reviewed sessions – as well as keynote presentations from leading individuals transforming the telehealth industry – on how they're overcoming barriers and advancing telemedicine through the professional, ethical and equitable improvement in health care delivery.

Knowing of your role in advising Sen. Wicker on health issues, we believe this visit might provide needed insights into the impacts of certain federal policies on telehealth-provided services and payment innovations in your state.

Thank you in advance for your consideration. I hope that you will be able to accept our invitation to participate. I will follow-up with your office regarding the details of this event.

Sincerely,

Jonathan D. Linkous
Chief Executive Officer

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): American Telemedicine Association
2. Description of the trip: annual association meeting with about 5,000 attendees
3. Dates of travel: Monday April 24 - Tuesday April 25
4. Place of travel: Orlando, FL
5. Name and title of Senate invitees: Aimee Grace, Health Policy Advisor for Sen. Schatz
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - ~~OR~~
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - ~~AND~~
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - ~~AND~~
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

OR

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

OR

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

attached

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

attached

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

attached

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Association is a 501(c)(3) membership organization. This meeting will have more than 100 educational sessions (meeting the criteria for continuing medical education credit).

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	attached	attached	attached	attached

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

Association annual meeting is arranged and organized without regard to Congressional participation

18. Reason for selecting the location of the event or trip

Meeting location varies for membership convenience

19. Name and location of hotel or other lodging facility:

Hyatt Regency Orlando

20. Reason(s) for selecting hotel or other lodging facility:

primary hotel for 2017 meeting

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging will be covered by hotel space available to sponsor for meeting package. Lunches will be part of public meeting services and sessions.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Coach class commercial air

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

No additional entertainment over and above what is listed in the daily schedule (attachment per #11)

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: 

Name and Title: Jonathan D. Linkous, Chief Executive Officer

Name of Organization: American Telemedicine Association

Address: 1100 Connecticut Ave NW, Washington, DC 20036

Telephone Number: 202-223-3333

Fax Number: 202-223-2787

E-mail Address: jlinkous@americantelemed.org

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Attachment to Private Sponsor Travel Certification Form for the American Telemedicine Association

5. Mary Margret Johnson with Sen. Wicker
Aimee Grace with Sen. Schatz

11. A detailed itinerary for Johnson is as follows:

Sunday, April 23

9:00 am – 10:00 am Opening Plenary
10:15 am – 11:15 am Concurrent Session: Connected Health – Federal Opportunities and Challenges in 2017 (and Beyond)
11:30 am – 12:30 pm Telemedicine Specialty Consultations with Federally Qualified Health Centers
12:30 pm – 1:30 pm Lunch in Exhibit Hall
1:45 pm – 2:45 pm Development of a Telemental Health Network for Veterans and Their Families
3:00 pm – 4:00 pm An Emerging Research and Policy Agenda for Telemedicine
4:00 pm – 5:30 pm Reception in Exhibit Hall

Monday, April 24

8:30 am -9:30 am Plenary: Meeting The Challenges
9:30 am – 10:15 am Coffee Break in Exhibit Hall
10:15 am – 11:15 am Concurrent Session: Telemental Health, from Integration to Transformation
11:30 am – 12:30 pm Concurrent Session: Planning for MACRA, Health Reform Regulatory and Reimbursement Changes
12:30 pm – 1:30 pm Federal Policy Luncheon (**Johnson and Grace will speak**)
1:30 pm – 2:30 pm Concurrent Session: Tele-Emergency Performance Assessment Reporting Tool: A Standardized Approach to Measuring Impact
2:45 pm – 3:45 pm Concurrent Session: Transforming Care for Sexual Assault Patients, Clinicians and Communities
3:45 pm – 4:30 pm Coffee Break in Exhibit Hall
4:30 pm – 5:30 pm Spotlight Session: Women in Telemedicine: Leading The Charge of Healthcare Innovation
5:30 pm - 6:30 pm Reception in Exhibit Hall

Tuesday, April 25

8:30 am - 10:00 am Plenary: Expectations for Telemedicine and ATA
10:00 am – 10:45 am Coffee Break in Exhibit Hall
10:45 am – 11:45 am Concurrent Session: Children's Health to Family Health: Leveraging Technology to Increase Access to Care
11:45 am – 12:45 pm Lunch in Exhibit Hall
12:45 pm – 1:45 pm Concurrent Session: Telehealth of Tomorrow: Wearables & Apps to Data Analytics to New Payment Models and Beyond
2:00 pm - 3:00 pm Concurrent Session: From Volume to Value: Changing the Role of

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Telemedicine

This a multi-purpose, multi-track convention of a 501(c)(3) membership organization with about 5,000 attendees, featuring over 100 educational sessions (meeting the criteria for continuing medical education credit) and a large exhibit of commercial goods and services and other stakeholders (including some federal agency exhibits). The attendees will choose their specific activities.

More detailed convention information is at <http://www.ata2017.org>.

12. American Telemedicine Association is the leading resource and advocate promoting access to medical care for consumers and health professionals via telecommunications technology. ATA seeks to bring together diverse groups from traditional medicine, academic medical centers, technology and telecommunications companies, e-health, medical societies, government and others to overcome barriers to the advancement of telemedicine through the professional, ethical and equitable improvement in health care delivery.

Established in 1993 as a non-profit organization and headquartered in Washington, DC, membership in the Association is open to individuals, healthcare institutions, companies and other organizations with an interest in promoting the deployment of telemedicine throughout the world. ATA is governed by a Board of Directors which is elected by the association's membership.

13. The world's largest and most comprehensive meeting focused on telemedicine, digital, connected and mobile health will take place April 23-25, 2017, at the Orlando Convention Center. For over 20 years, the American Telemedicine Association's (ATA) Annual Conference & Trade Show has been the premier forum for healthcare professionals and entrepreneurs in the telemedicine, telehealth and mHealth space. An estimated 5,000 attendees from traditional medicine, academic medical centers, technology and telecommunications companies, e-health, medical societies, government and others will attend.

16. Total Expenses –

Transportation - \$400 – (\$350 round trip airfare; \$50 for transportation to and from the airport and hotel.)

Lodging – 2 nights for \$590

Food – 3 days for \$510 (This includes breakfast, coffee breaks, lunch, reception and dinner)

Other: Registration \$775 government rate

United States Senate

SELECT COMMITTEE ON ETHICS

April 7, 2017

Mary Margaret Johnson
Office of Senator Roger F. Wicker
United States Senate
Washington, DC 20510

Dear Ms. Johnson:

This responds to your recent correspondence concerning an invitation you received to travel to the ATA Annual Conference and Trade Show, in Orlando, Florida, on April 23-25, 2017, sponsored by the American Telemedicine Association.¹ The American Telemedicine Association certified to the Select Committee on Ethics (the Committee) that it will pay the *necessary expenses*² related to the travel and that it is neither a lobbyist, nor lobbying firm, nor an agent of a foreign principal, and it is not otherwise acting as a representative or agent of a foreign government. The American Telemedicine Association has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal, and that no registered lobbyist will accompany you at *any point throughout your trip*.³

Based on information and materials available to the Committee, and consistent with the guidance contained in this letter regarding extending your trip for a personal purpose, and assuming the **actual** travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this trip **may be accepted** under relevant Senate Rules and the Committee's *Regulations and Guidelines for Privately-Sponsored Travel*, so long as at the time of the payment or reimbursement, the American Telemedicine Association is neither a registered lobbyist nor lobbying firm under the Lobbying Disclosure Act of 1995, nor an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35.

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such

¹ Based on the information you submitted, the Committee understands that, for a personal purpose, you intend to extend your trip in Orlando for less than 1 day before the beginning of the officially related events. You are personally responsible for any additional expenses incurred as a result of extending your trip.

² The term "necessary expenses" has a specific definition. See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

³ The term "any point throughout your trip" has a specific definition. See *id.* at 2.

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authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel.**⁴

Finally, Senate Rule 34 requires a reporting individual,⁵ on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$390 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,



Deborah Sue Mayer
Chief Counsel and Staff Director

Enclosure: Travel Checklist

⁴ Trip extensions for any purpose do not extend this deadline.

⁵ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$124,406 for CY 2017) or is a political fund designee and is required to file Financial Disclosure Reports.

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